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Alberta

EDUCATION

MANAGEMENT FINANCE PLAN

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ON
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SIGNIFICANT EVENTS

- RATES OF ECONOMIC GROWTH AND POPULATION INCREASE HAVE SLOWED DOWN

- VARIETY OF EDUCATIONAL TASK FORCES THAT RECOMMEND CHANGES,
  - GIFTED AND TALENTED
  - COMPUTERS
  - SCHOOL LIBRARIES
  - SCHOOL FINANCE
  - EVALUATION
  - GRANT SIMPLIFICATION AND DEREGULATION

- NEED FOR INCREASED ORGANIZATIONAL EFFICIENCY, EFFECTIVENESS AND RESPONSIVENESS TO CHANGING CIRCUMSTANCES.

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PROPOSAL

- A NUMBER OF CONCURRENT CHANGES TO ALBERTA'S EDUCATIONAL SYSTEM ARE PROPOSED OVER THE NEXT THREE TO FOUR YEARS (1984 - 1987).

- SINCE THE PROVISION OF QUALITY EDUCATION RESULTS FROM A COMPLEX SET OF INTERDEPENDENT AND CONSTANTLY CHANGING FACTORS, A MULTI-FACETED APPROACH WAS DEVELOPED, COMPRISED OF SEVERAL RELATED GOALS.

WHAT - THE GOALS

- IMPROVED INFORMATION ON THE RESULTS OF EDUCATION PROGRAMMING AVAILABLE TO STUDENTS, PARENTS, TEACHERS, SCHOOL JURISDICTIONS AND OTHER EDUCATIONAL AGENCIES.

- INCREASED RESPONSIVENESS BY THE TOTAL EDUCATIONAL SYSTEM TO THE CHANGING NEEDS OF STUDENTS AND PARENTS.

- WITHIN POLICY DIRECTIONS ESTABLISHED BY THE PROVINCE, INCREASED LOCAL RESPONSIBILITY, AUTONOMY, FLEXIBILITY AND DISCRETION BY SCHOOL JURISDICTIONS OVER THE USE OF PROVINCIAL FUNDS TO MEET LOCAL NEEDS.

- INCREASED ACCOUNTABILITY OF BOTH ALBERTA EDUCATION AND SCHOOL JURISDICTIONS TO THE ELECTORATE.

- INCREASED EFFICIENCY AND EFFECTIVENESS IN THE USE OF LIMITED PUBLIC FUNDS FOR THE PROVISION OF EDUCATION WITH THE FOCUS ON PROVIDING BENEFITS DIRECTLY TO STUDENTS.

- ENHANCED PARTNERSHIP AMONG SCHOOL ORGANIZATIONS AND ALBERTA EDUCATION IN THE PLANNING AND EVALUATION OF EDUCATIONAL RESULTS.

HOW - THE MEANS

SELECTED MEANS TO ACHIEVE THE GOALS ARE OUTLINED BELOW:

- DEVELOPING AN IMPROVED MANAGEMENT CAPACITY FOR THE DELIVERY OF EDUCATION IN ALBERTA.
- SIMPLIFICATION OF ADMINISTRATIVE PROCEDURES, AS REQUIRED.
- REDUCTION IN SIZE AND COMPLEXITY OF ALBERTA EDUCATION, WHILE ENHANCING THE ROLE OF THE REGIONAL OFFICES OF EDUCATION (ROE).
- GREATER PARTICIPATION IN JOINT PROVINCIAL/LOCAL ACTIVITIES.
- MORE AVENUES FOR PUBLIC FEEDBACK TO AND QUICK RESPONSES FROM ALBERTA EDUCATION.
- DEVELOPMENT AND MANGEMENT OF PROVINCIAL AND LOCAL PROGRAM AND EVALUATION POLICIES.
- EXISTENCE AND MANAGEMENT OF LOCAL EDUCATION PLANS.
- SIMPLIFIED AND IMPROVED PROVINCIAL BUDGET MECHANISMS.
- DEVELOPMENT AND USE OF SCHOOL JURISDICTION ANNUAL REPORTS.
- CONDUCTING AND ACTING ON THE THE RESULTS OF EVALUATIONS AND OTHER STUDIES.

OUTCOMES

- THE MANY INTERESTS IN EDUCATION WILL HAVE EASIER ACCESS TO IMPROVED INFORMATION ABOUT EDUCATIONAL POLICIES AND THE RESULTS ACHIEVED.

- THE INFORMATION WILL BE USED MORE EFFECTIVELY AND CONTINUALLY TO IMPROVE THE QUALITY OF EDUCATION.

- AN IMPROVED MANAGEMENT PROCESS FOR EDUCATION IN ALBERTA.

FIELD TESTING AND CONSULTATION

- ALL THE MAJOR MANAGEMENT TOOLS WILL BE FIELD TESTED WITH PILOT SCHOOL JURISDICTIONS BEFORE THEY ARE IMPLEMENTED.

- EXAMPLE: THE GRANT APPLICATION FORM AND SCHOOL JURISDICTION ANNUAL REPORT WILL BE FIELD TESTED IN JUNE, 1984. REVISIONS WILL OCCUR AS REQUIRED.

- CONSULTATION WITH SCHOOL JURISDICTIONS BEFORE IMPLEMENTATION IS OF HIGH PRIORITY TO ALBERTA EDUCATION.

WHEN

MANAGEMENT AND FINANCE PLAN

IMPLEMENTATION TIMELINE

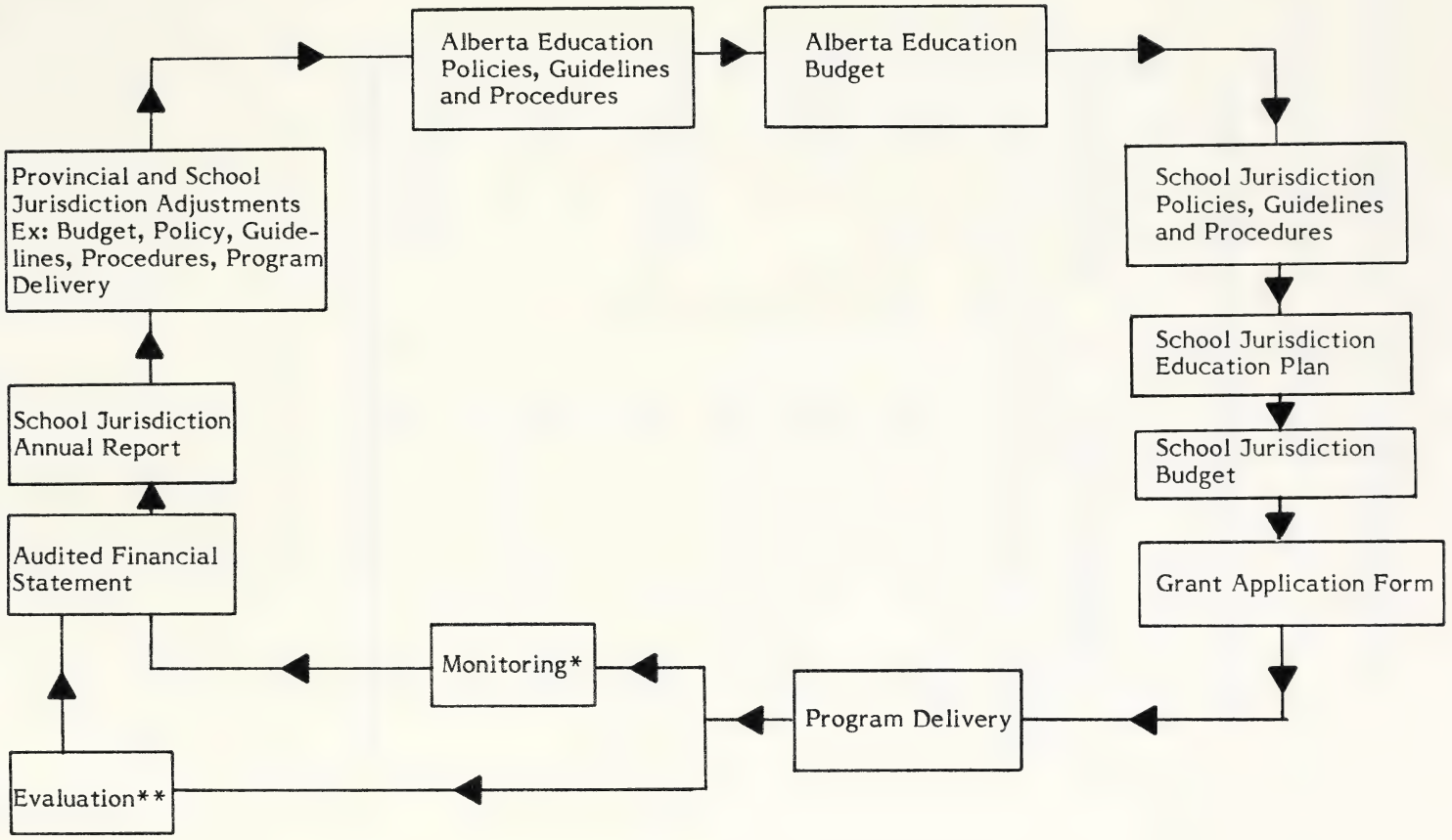
THE KEY IMPLEMENTATION DATES FOR THE M.F.P. ARE OUTLINED BELOW:

APRIL 1, 1984	ALBERTA EDUCATION PROGRAM POLICY MANUAL TABLED.
JUNE 1, 1984	FIELD TESTING OF GRANT APPLICATION FORM.
JUNE - AUGUST, 1984	FIELD TESTING OF SCHOOL JURISDICTION EDUCATION PLAN AND ANNUAL REPORT.
AUGUST, 1984	ALBERTA EDUCATION PROGRAM POLICY MANUAL MODIFIED, AS REQUIRED.
OCTOBER 15, 1984	THE MODIFIED GRANT APPLICATION FORM IS SUBMITTED TO ALBERTA EDUCATION.
JANUARY 1985	LOCAL EVALUATION POLICIES ARE DEVELOPED AND KEPT ON FILE AT THE LOCAL LEVEL.
JULY 31, 1985	THE FIRST SCHOOL JURISDICTION ANNUAL REPORT IS SUBMITTED.
SEPTEMBER 1985	PROGRAM POLICIES FOR THE SPECIAL NEEDS, SCHOOL CAPITAL, B.Q.R.P. AND TRANSPORATION PROGRAMS ARE DEVELOPED AND IN PLACE AT THE LOCAL LEVEL.
SEPTEMBER 1985	THE FIRST SCHOOL JURISDICTION EDUCATION PLAN IS DEVELOPED AND KEPT ON FILE.
SEPTEMBER 1986-87	ECS-12 BASIC PROGRAMS WILL BE INCLUDED AS APPROPRIATE.
ONGOING	CONSTANT MONITORING, CONSULTATION WITH SCHOOL JURISDICTIONS AND ADJUSTMENTS TO THE MANAGEMENT PROCESS WILL OCCUR AS REQUIRED.

THE MANAGEMENT OF EDUCATION

KEY ELEMENTS

THE MANAGEMENT OF EDUCATION PROCESS CHART


Alberta Education Policies, Guidelines and Procedures
Alberta Education Budget
School Jurisdiction Policies, Guidelines and Procedures
School Jurisdiction Education Plan
School Jurisdiction Budget
Grant Application Form
Program Delivery
Monitoring*
Evaluation**
Audited Financial Statement
School Jurisdiction Annual Report
Provincial and School Jurisdiction Adjustments Ex: Budget, Policy, Guidelines, Procedures, Program Delivery

*Continuous Monitoring Throughout the Process
**Includes Provincial Evaluation Procedures

The Management Process results in the following shift of emphasis:

Degree of Emphasis Placed on Key Management Tools

Management Tools	Degree of Emphasis	
	Present	Proposed
Policies	Low	High
Guidelines	Low	High
Regulations	High	Low
Procedures	High	Medium
Forms	High	Low
Education Plan of School Jurisdictions	Low	High
Audit	Low	Medium
Monitoring	Low	High
Evaluation	Low	High
Annual Reports of School Jurisdictions	Low	High

THE MANAGEMENT PROCESS CAN BE SUBDIVIDED INTO THREE MAJOR PHASES:

1. PLANNING AND DEVELOPMENT

2. DELIVERY AND MONITORING

3. MANAGEMENT OF RESULTS

PHASE ONE: PLANNING AND DEVELOPMENT

- DEVELOPMENT/MODIFICATION TO POLICIES, GUIDELINES AND PROCEDURES

- BUDGET FORMULATION

- SCHOOL JURISDICTION EDUCATION PLAN

POLICY

POLICY: A POLICY IS A PHILOSOPHICALLY-BASED STATEMENT WHICH IS GOAL ORIENTED AND ESTABLISHES THE DIRECTION FOR FUTURE DISCRETIONARY ACTION.

EXAMPLE

FOR THE PURPOSE OF ENHANCING INDIVIDUAL ABILITIES AND FUTURE EDUCATIONAL OPPORTUNITIES, ALBERTA EDUCATION SUPPORTS THE PROVISION OF INTEGRATED SERVICES THROUGH PARENTS, STAFF AND COMMUNITY, WHICH ADDRESSES THE DEVELOPMENTAL NEEDS OF EACH CHILD BELOW THE AGE OF SCHOOL ENTRANCE.

(E.C.S. POLICY STATEMENT)

GUIDELINE

GUIDELINE: A GUIDELINE FURTHER DEFINES THE FRAMEWORK WITHIN WHICH THE ORGANIZATION CAN DISCHARGE THE POLICY WITH POSITIVE DIRECTION. IT TELLS WHAT IS WANTED. IT MAY ALSO INDICATE WHY AND HOW.

EXAMPLE

ALBERTA EDUCATION SUPPORTS THE DELIVERY OF EARLY CHILDHOOD PROGRAMS THROUGH PUBLIC AND PRIVATE OPERATORS.
(E.C.S. GUIDELINE)

PROCEDURE

PROCEDURE: A PROCEDURE IS A STATEMENT OF WHO DOES WHAT, HOW AND IN WHAT SEQUENCE. PROCEDURES MAY BE EITHER MANDATORY OR DISCRETIONARY.

EXAMPLE:

OPERATORS WILL DEVELOP AND MAINTAIN ON FILE THEIR EDUCATIONAL PLAN WHICH OUTLINES THEIR POLICIES, GUIDELINES, PROCEDURES, AND INTENDED RESULTS.

(E.C.S. PROCEDURE)

SCHOOL JURISDICTION EDUCATIONAL PLAN

THE EDUCATION PLAN IS DEVELOPED AND KEPT ON FILE. IT SHOULD CONTAIN AT LEAST THE FOLLOWING ELEMENTS:

- A MISSION STATEMENT OR PURPOSE WHICH STATES THE OVERALL PHILOSOPHY AND WHAT THE ORGANIZATION INTENDS TO DO.

- GOALS, POLICIES, GUIDELINES AND PROCEDURES LIKE THOSE FOUND IN THE POLICY MANUAL WHICH HAVE BEEN DEVELOPED TO FACILITATE THE DELIVERY AND EVALUATION OF PROGRAMS AT THE LOCAL LEVEL.

- A WRITTEN STATEMENT OF INTENDED RESULTS WHICH OUTLINES WHAT THE SCHOOL JURISDICTION INTENDS TO ACCOMPLISH WITH THE RESOURCES AT ITS DISPOSAL.

THIS COMPONENT OF THE MANAGEMENT PROCESS STILL REQUIRES DETAILED DISCUSSION AND FURTHER DEVELOPMENT WITH THE SCHOOL JURISDICTIONS. THIS PROCESS WILL OCCUR DURING THE PERIOD JULY 1984 - JANUARY 1985.

PHASE TWO: DELIVERY AND MONITORING

THE SECOND PHASE OF THE MANAGEMENT PROCESS INCLUDES THE:

- GRANTS APPLICATION FORM, WHICH INCLUDES VERIFICATION THAT THE JURISDICTION'S EDUCATION PLAN AND THE PROGRAM FOR WHICH THE GRANTS ARE REQUESTED ARE IN PLACE.

- DELIVERY OF PROGRAMS AT THE LOCAL LEVEL.

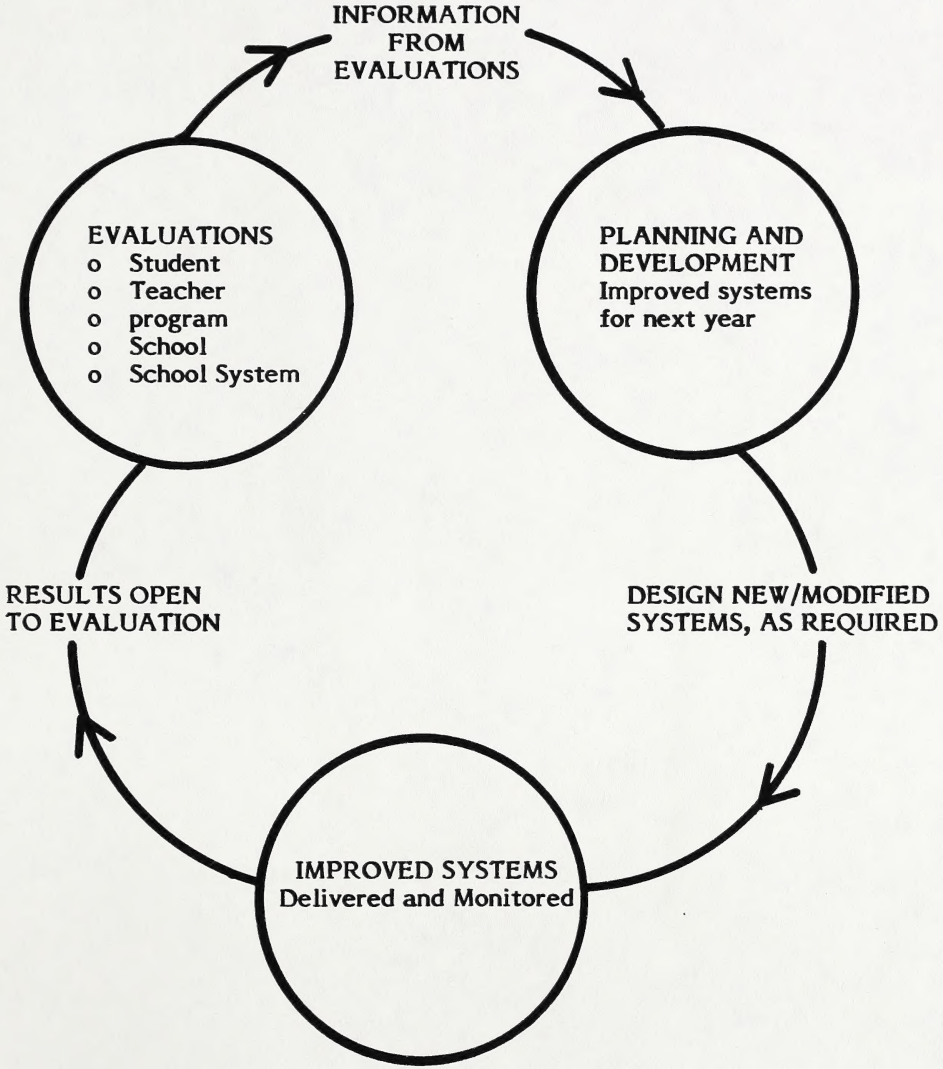
- MONITORING OF PROGRAMS DELIVERED AT THE LOCAL LEVEL BY ALBERTA EDUCATION AND THE SCHOOL JURISDICTION.

PHASE THREE: THE MANAGEMENT OF RESULTS

THE THIRD PHASE OF THE PROCESS INCLUDES:

- THE CONTINUOUS EVALUATION OF THE PROGRAMS DELIVERED AT THE LOCAL LEVEL.
- THE SCHOOL JURISDICTION ANNUAL REPORT.
- THE AUDITED FINANCIAL STATEMENT.
- CONTINUOUS ADJUSTMENTS THROUGHOUT THE ENTIRE MANAGEMENT PROCESS, IF REQUIRED.

THE THREE GENERAL PHASES OF THE MANAGEMENT PROCESS ARE SUMMARIZED BELOW:



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